

Homeowner Assistance Claim (for income received in 2003) 9000H

STEP 1**Name and address**

| | | |
|-----------------------------------------------------------------|---------|------------------|
| Your first name | Initial | Last name |
| Spouse's first name | Initial | Last name |
| Present home address — number and street, PO Box or rural route | | Apt. no. PMB no. |
| City, town, or post office | | State ZIP Code |

STEP 2**Social security number**

Your social security number

Spouse's social security number

IMPORTANT:

Your social security number is required.

STEP 3**Filing status**

| | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|----------------------------------------------------------|
| 1. Are you a United States citizen? Check "Yes" or "No" | • 1. | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| If you checked "Yes," skip line 2 and go to line 3. If you checked "No," go to line 2. | | |
| 2. Benefit Eligibility for Noncitizens | • 2a. | Alien Status Code |
| If you are not a citizen of the United States, go to page 10. If you have a qualifying alien status for the United States, enter your alien status code from the chart on page 10 on line 2a. | | |
| Then enter your alien registration number on line 2b and your date of entry into the United States on line 2c. (MM/DD/YYYY) | | |
| 3. Check the appropriate box if you were one of the following on December 31, 2003: | • 2b. | Alien Registration Number |
| <input type="radio"/> A. 62 years or older (See Note on page 5, line 3a) | • 2c. | / / |
| <input type="radio"/> B. Under 62 and blind | | Date of Entry |
| <input type="radio"/> C. Under 62 and disabled (not blind) | | <input type="checkbox"/> |
| 4. Enter your date of birth (example: 0 5 / 2 1 / 1 9 3 8) | • 4. | / / |
| You must enter your date of birth MM DD YYYY | | |
| See instructions on page 5 to see if you must attach a proof document to your claim. If you cannot check one of the boxes, STOP HERE. You do not qualify to file for a Homeowner Assistance claim. | | |
| | | Date of Birth |

STEP 4**Property information**

Complete line 5 through line 7.

| | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|----------------------------------------------------------|
| 5. Did you own and live in your home on December 31, 2003 | 5. | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| If "No," STOP. You do not qualify for homeowner assistance. | | |
| a. Enter the FULL value of your property (after subtracting your homeowner's or veteran's exemption and special assessments or bonds). See page 6 | • 5a. | \$ |
| 6. Is your property used for rental and/or business as well as personal use? | 6. | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| If you checked "Yes," enter the estimated percentage of property devoted to your personal use. See page 6 | | |
| 7. List name(s) and relationship(s) of anyone, other than yourself, who is included on your property tax bill. See page 6. | ► 6a. | % |
| Did this person live in your home in 2003? | | |
| Name _____ Relationship _____ | | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| Name _____ Relationship _____ | | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| Name _____ Relationship _____ | | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| Enter your percentage of ownership | ► 7. | % |

STEP 5

Yearly income of household members

On line 8 through line 13 enter your total household income for the 2003 calendar year. See instructions on page 6 and page 7.

8. Social Security and/or Railroad Retirement 8.
9. Interest, Dividends, and/or Gain (or Loss) 9.
10. Pensions, Annuities, and IRA distributions 10.
11. SSI/SSP, AB, and ATD (Gold Check). See page 7 11.
(full-year total)
12. Rental and Business Income (or Loss). See page 7 12.
13. Other Income (including wages). See page 7 13.
14. SUBTOTAL. Add line 8 through line 13 14.

(Dollars)

(Cents)

STEP 6

Adjustments to income

15. Adjustments to income. See page 7 15.

STEP 7

Total household income

Do you receive Temporary Assistance for Needy Families, formerly Aid to Families with Dependent Children (AFDC)?

☐ YES ☐ NO

16. TOTAL HOUSEHOLD INCOME IN 2003.

Subtract line 15 from line 14 • 16.

If line 16 is more than \$38,505, STOP. You do not qualify.

STEP 8

Property tax paid and homeowner assistance claimed

17. PROPERTY TAX FOR 2003/2004 ○ • 17.

DO NOT INCLUDE SPECIAL OR DIRECT ASSESSMENTS.

Amount on line 17 cannot exceed 1% of the full value of the home.

See page 8 to see if you must attach a copy of your 2003/2004 property tax bill.

You do not have to complete line 18. If you stop here, we will figure the amount of assistance for you.

18. Homeowner assistance claimed. (Cannot exceed \$472.60)

See page 8 ■ 18.

Reminder

If this is your first year filing a Homeowner Assistance claim and you did not receive SSI, please provide proof of your age, disability, or blindness.

If you filed a claim last year and are under 62 years old, you will need to provide proof of your temporary disability if you did not receive SSI. (This is an annual requirement.)

STEP 9

Signature, date, and telephone number

Caution: To avoid delay of your check, be sure to provide all requested information, sign below, and mail to: **FRANCHISE TAX BOARD, PO BOX 942886, SACRAMENTO CA 94286-0904.**

I authorize the Franchise Tax Board to match my name and the information provided herein, as well as information necessary to process my claim, against information gathered from public records, the files of the Department of Health Services, and other state or federal agencies to confirm my eligibility for the Homeowner Assistance Program.

Under penalties of perjury, I declare that this claim and all statements regarding my eligibility and citizenship or alien status, including accompanying schedules and any additional information I may provide to the Franchise Tax Board are to the best of my knowledge, true, correct, and complete.

Sign Here ➡

X _____ Date _____

Claimant's signature

Claimant's Daytime Telephone Number • ()

Paid Preparer's Use Only

PREPARER'S SIGNATURE ➡

Date

Check if self-employed ☐

Preparer's social security number/PTIN

FIRM'S NAME (OR YOURS, IF SELF-EMPLOYED) AND ADDRESS ➡

FEIN

TELEPHONE ()

Do not write in this space

Do not write in this space

L**D****I****A****R****RES**

Line 7 – Names on Your Property Tax Bill

List the name(s) and relationship(s) of anyone, other than yourself, who is included on your property tax bill. Indicate whether they lived in your home in 2003 by checking “Yes” or “No.”

Enter 100% as your percentage of ownership if the name(s) listed on your 2003/2004 property tax bill include only your spouse or any of the following persons related to you or to your spouse:

- Parents;
- Children or their spouses; or
- Grandchildren or their spouses.

If your interest in your property is a recorded life estate, you are entitled to assistance on the tax assessed on your property.

Note: Death or divorce ends the relationship of any individual above who is related to the claimant only by marriage.

Complete the following worksheet only if there are owners on your 2003/2004 property tax bill other than the relatives listed above and each owner has an equal percentage of ownership. If each owner does not have an equal percentage of ownership, do not complete the worksheet, go to line 7 of form FTB 9000H and enter your percentage of ownership.

1. Total number of owners listed on your 2003/2004 property tax bill 1. _____
2. Number of owners, other than those listed above who did not live with you during
the period January 1, 2003, through December 31, 2003 2. _____
3. Subtract line 2 from line 1 3. _____
4. Divide the amount on line 3 by the amount on line 1. This is your percentage of
ownership of the home. Enter this percentage on form FTB 9000H, line 7 4. _____

Worksheet to Figure the Amount of Homeowner Assistance, Form FTB 9000H

If you want, we will figure the amount of homeowner assistance for you. You may, however, figure this amount by completing line 1 through line 9 for those items that apply to you.

Complete only if the full value of your property as shown on your 2003/2004 property tax bill is more than \$34,000 after subtracting your homeowner's or veteran's exemption and special assessments or bonds.

1. Enter the full value shown on form FTB 9000H, line 5a 1. \$ _____
2. Divide \$34,000 by the amount on line 1 above (100% maximum) 2. _____ %

Complete only if your property is used for rental and/or business purposes as well as for your home.

3. Enter the percentage of your home devoted to your personal use shown on form FTB 9000H, line 6a 3. _____ %

Complete only if there are owners (other than you and your spouse, or the parents, children, grandchildren [or their spouses] of you or your spouse) listed on your property tax bill who do not live in your home.

4. Enter the percentage of your ownership shown on form FTB 9000H, line 7 4. _____ %

Figure the amount of homeowner assistance.

5. Enter the property tax for 2003/2004 shown on form FTB 9000H, line 17 5. \$ _____
6. Enter the smallest percentage from line 2, line 3, or line 4 above.
Enter 100% if line 2, line 3, and line 4 are blank 6. x _____ %
7. Multiply the amount on line 5 by the percentage on line 6. Enter this amount or \$340.00 whichever is smaller 7. \$ _____
8. Find your total household income on the Homeowner Assistance Schedule below and enter the percentage of assistance here 8. x _____ %
9. Homeowner assistance. Multiply the amount on line 7 by the percentage on line 8. Enter this amount on form FTB 9000H, line 18 9. \$ _____

Homeowner Assistance Schedule

| If your total household income is | | Your percentage of assistance is | If your total household income is | | Your percentage of assistance is |
|-----------------------------------|---------|----------------------------------|-----------------------------------|----------|----------------------------------|
| From | To | | From | To | |
| \$0 | \$9,625 | 139% | 21,180 | 21,821 | 59% |
| 9,626 | 10,267 | 136% | 21,822 | 22,463 | 54% |
| 10,268 | 10,909 | 133% | 22,464 | 23,103 | 49% |
| 10,910 | 11,551 | 131% | 23,104 | 23,744 | 45% |
| 11,552 | 12,193 | 128% | 23,745 | 24,388 | 41% |
| 12,194 | 12,835 | 125% | 24,389 | 25,029 | 36% |
| 12,836 | 13,476 | 122% | 25,030 | 25,670 | 32% |
| 13,477 | 14,118 | 119% | 25,671 | 26,311 | 29% |
| 14,119 | 14,760 | 116% | 26,312 | 26,953 | 26% |
| 14,761 | 15,403 | 113% | 26,954 | 27,595 | 23% |
| 15,404 | 16,043 | 110% | 27,596 | 28,237 | 20% |
| 16,044 | 16,685 | 106% | 28,238 | 28,879 | 17% |
| 16,686 | 17,328 | 100% | 28,880 | 30,484 | 15% |
| 17,329 | 17,970 | 94% | 30,485 | 32,088 | 12% |
| 17,971 | 18,611 | 88% | 32,089 | 33,693 | 10% |
| 18,612 | 19,252 | 83% | 33,694 | 35,297 | 9% |
| 19,253 | 19,894 | 77% | 35,298 | 36,901 | 7% |
| 19,895 | 20,535 | 71% | 36,902 | 38,505 | 6% |
| 20,536 | 21,179 | 65% | \$38,506 | And Over | 0% |